



Retirement Checklist

When you are getting ready to retire:

1. ☐ Decide your LANS Termination Date (last day in pay status).
2. ☐ Decide your retirement date.
 - TCP1 Pension Start Date is the first of the month.
 - TCP2 Pension Start Date can be any day of the week.
3. ☐ Start your retirement benefits by contacting the below as applicable 90-days prior to pension start date.
 - TCP1 contact AonHewitt's Your Pension Resources (YPR) at 866-370-7301
 - TCP2 contact University of California Retirement Plan (UCRP) at 800-888-8267
4. ☐ Communicate your termination date to your manager at least 14 calendar days before the termination date.
 - Accrued vacation can be used to extend your termination date only if you are retiring.
5. ☐ Ensure termination request is submitted in Oracle with "Voluntary Retirement" indicated as the termination reason.
 - Your medical, dental, vision and legal coverage will end the last day of the following month or your termination. i.e. Termination date 10/29/15. LANS coverage ends 11/30/15. Retiree H&W effective 12/01/15.
6. ☐ Access your other retirement benefits as applicable:
 - Fidelity Investments for:
 - LANS 401(k) and Roth 401(k) – 800-835-5095
 - UC's 403(b), 457(b) or Defined Contribution Plan (DCP) –800-343-0860
 - UC's Capital Accumulation Payment (CAP) - 800-888-8267
7. ☐ Eligibility for Retiree Health & Welfare (H&W) benefits is determined by Empyrean Benefit Solutions. If you have not been contacted by Empyrean Benefit Solutions you may contact them directly at 1-844-805-0002.
8. ☐ If you are 65+, you must contact the Social Security Administration at 1-800-772-1213 regarding your eligibility for the Medicare benefit. If you are not eligible for Medicare under your own work history, it is possible that you have attained eligibility under your spouse's work history.

IMPORTANT:

LANS requires each retiree and enrolled family member who is eligible for Medicare to enroll in Medicare Part A and Part B when first eligible. Those who do not comply will be terminated from coverage under the LANS H&W benefit program and will not be eligible to re-enroll.

9. ☐ Upon termination, if your personal address changes, update with applicable providers.